



BENEFICIARY DESIGNATIONS: Gifts You Make by Signing Your Name

Making a gift through a beneficiary designation of your retirement plan, bank or brokerage account, donor-advised fund or life insurance policy is one of the easiest ways to support our work. It's simple and offers many benefits:

- There is no immediate cost to you. You retain full control of your assets for as long as you need them.
- There is no need to go to the trouble or expense of creating or updating a will—it's a simple matter of filling out a form.
- You are not locked into a decision you make today—you can change your beneficiaries at any time.
- You can designate Fòs Feminista to receive all or some percentage of the account value, leaving the remainder to your heirs.
- There is no minimum gift. Just 1% will make a big difference.

Avoid Costly Taxes

Because retirement plans are taxed differently from most assets, they may become a tax liability when passed on to your heirs. Naming Fòs Feminista a beneficiary of your retirement account can reduce income and possible estate taxes for your loved ones.

Since Fòs Feminista is tax-exempt, 100% of your gift will go to ensuring that future generations women and girls in some of the most overlooked communities in the world will be able to access reproductive care. Here's how it works:

Beneficiaries	Your Heirs	Fòs Feminista
Gift Amount	\$100,000	\$100,000
Income Tax*	(\$37,000)	\$0
Net to Beneficiary	\$63,000	\$100,000

**Based on estimated income tax rate of 37%*

A Few Facts to Keep in Mind

- You may need a spousal waiver. If you live in certain community or marital property states, spousal consent is generally required to name someone or some entity other than your spouse as the beneficiary of an IRA.
- If you have a 401(k), 403(b) or other workplace retirement account, you will need a properly executed spousal waiver if you designate more than 50% of the account to go to charity or other non-spouse beneficiaries.
- With all legacy gifts, including gifts by beneficiary designation, it's always a good idea to consult with your lawyer or other financial advisor.

Do You Need to Update Your Beneficiary Forms?

Take this short quiz to determine if it's time to create or update your beneficiary forms.

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	Has it been three years or more since your last reviewed your forms?
<input type="checkbox"/>	<input type="checkbox"/>	Have you recently retired or changes jobs?
<input type="checkbox"/>	<input type="checkbox"/>	Has your marital status changed?
<input type="checkbox"/>	<input type="checkbox"/>	Has your health status changed?
<input type="checkbox"/>	<input type="checkbox"/>	Have you welcomed a new child or grandchild?
<input type="checkbox"/>	<input type="checkbox"/>	Would you like to leave a gift to charity through a beneficiary designation?

If you answered “yes” to any of these questions, it's time to create or update your forms.

Two Simple but Important Steps

While making a gift by beneficiary designation is simple, there are two steps you should take to ensure that your gift is distributed to Fòs Feminista as you intend:

Step 1: Include Fòs Feminista's Tax ID Number and address on your form.

Even if the beneficiary designation form doesn't request a Tax ID number or address, including it will help ensure that your intended gift goes to the right place.

Name: Fòs Feminista

Tax ID Number: 13-1845455

Address: 125 Maiden Lane, 9th Floor New York, NY 10038-4730

Step 2: Let us know!

Several large financial services companies explicitly state that they have no obligation to notify Fòs Feminista or your other charitable beneficiaries of your gift after your lifetime. If we know about your gift, we can act to make sure your wishes are carried out.

Office of Gift Planning

125 Maiden Lane, 9th Floor
New York, NY 10038-4730



Telephone: 212-214-0228



Email: giftplan@fosfeminista.org

Access our complimentary planning library at myimpact.fosfeminista.org